

Pre-Proposal Conference
Developmental Disabilities Administration Solicits
Targeted Case Management Training Request for Proposal
DHMH-OPASS 17-17062
June 2, 2016

Conference began at 9:36 a.m.

Opening Remarks and Introductions were facilitated by Queen Davis, Contract Officer for the Office of Procurement and Support Services (OPASS). Sign-in sheet was provided and all participants signed.

DHMH Attendees:

Queen Davis, Contract Officer, OPASS; Chevelle McGinnis, Procurement Coordinator, DDA; Terah Tessier, Director of Coordination of Community Services, DDA; Victoria Dunn, Chief of Procurement, DDA; Elizabeth Heinle, MBE RFP Coordinator

Vendor Attendees:

S. Orlene Grant, President, The Grant Group; Paul Saulino, CFO, Values into Action; Tiffi'ni M. Davis, Abundant Living Resources

Minutes transcribed by Nicole C. Smith, Administrative Aide, DDA

Agenda:

Overview of Procurement Process-Queen Davis

Participants were asked to review Section 1 of the RFP called "General Information" as noted. This solicitation is issued by the Department of Health and Mental Hygiene (DHMH) and the Soliciting Program is the Developmental Disabilities Administration (DDA). The Developmental Disabilities Administration (DDA) is issuing this request for proposal for the purposes of establishing and implementing of statewide, standards for training of licensed providers that provide targeted case management, coordination of community supports as consistent with requirements set forth in COMAR 10.22.09.

This request for proposal has two minimum qualifications as noted in Section 2 of the RFP. The author must provide proof of the following minimum qualifications in order to be considered for the contract award. The minimum qualifications are:

- 1) Author must demonstrate a minimum of three years of experience within the last seven years providing training to support case managers of Home and Community Based Developmental Disabilities services. This requirement may be met through proof of performance of past contracts or letters of reference.

Victoria Dunn: stated that the minimum qualifications were removed from the RFP. The reasoning was to ensure that more individuals could bid on the proposal to provide this service.

Queen Davis: Per her notes, verified that indeed the Control Agency for OPASS did rescind the minimum qualifications from the RFP. There are no minimum qualifications for this RFP.

The RFP and all subsequent documents related to this solicitation will be posted on eMaryland Marketplace website and also on the DHMH Procurement website. The websites are all listed in Section 1 of the RFP. Please remember that in order to receive a contract award the vendor must be registered on eMarylandMarketplace. Registration is free. Please review Section 1.8 of the RFP for more details.

Question: Page 19-Section 1.33, MBE Goals, Sub-goals-Are there any sub-goals? Response: There are no sub-goals. There is a 3% MBE goal.

Section 1.8: eMarylandMarketplace: explains the registration process.

Section 1.9: Questions: gives you information on how to submit questions subsequent to the RFP and after the pre-proposal conference. Questions should be submitted via email to the Procurement Officer. The website link is <http://dhmh.solicitationquestions@maryland.gov>. Questions should be submitted no later than five days prior to the proposal due date. Procurement Officer due to the availability of time to research and communicate an answer, shall decide whether to answer before the proposal due date. Please submit your questions as soon as possible.

The duration of the contract for the period of time from the date of contract commencement through the Go-Live Date will be the contract “Start-Up Period”. This information is located in Section 1.4.

Question: “What is the turnaround time to submit questions?” Response: Depends on the nature of the questions and how much research is involved. The duration of the contract will be from the Go Live Date plus two years after the Go Live Date for the provision of all services required by the contract and the solicitation requirements.

Emphasize sections of the RFP that must be reviewed carefully.

-Section 3: Scope of Work

Please review all sub-sections to get a full understanding of the requirements for the request for proposal.

-Section 4: Proposal Format

The request to vendors is to submit their proposals in two parts. This process is described in Section 4-Proposal Format. Proposals shall be submitted two separate volumes. First volume is the Technical Proposal. This proposal must be submitted in a separate, sealed, envelope. Second volume is the Financial Proposal. This proposal must also be submitted in a separate, sealed, envelope.

-Section 4.4: Technical Proposal

This section explains what should be included in the proposal and how to submit the proposal.

-Sub-section 4.4.2: Additional Documents

Pay special attention to this section when submitting additional documents.

-Section 4.5: Financial Proposal

This section explains what should be included in the proposal and how to submit the proposal.

MBE Subcontractor for Participation goal of 3% is of the total contract dollar amount which is explained in Attachment F which is called “Financial Proposal Form” of the RFP. This form must be submitted within the Financial Proposal.

Vendors are asked to review Section 1.33-Minority Business Enterprise Goals to get instructions on how to complete Attachments D1-D5. Attachment D1A-MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule must be completed and submitted with the Technical proposal. If the Bidder/Offeror does not accurately complete and submit the MBE Utilization and Fair Solicitation Affidavit and Participation Schedule with the proposal, the Procurement Officer will deem the proposal incomplete and unacceptable for selection for an award.

Attachment D-1B Waiver Guidance

This attachment gives guidance for documenting good faith efforts to meet MBE Participation Goals. The vendor must document the following:

- 1) Meet the MBE Goal, document its commitment for participation of MBE Firms
- 2) If asking for an MBE waiver, must document its good faith efforts to meet the goals

Good Faith Efforts is defined as follows; the bidder/offeror must demonstrate that it took all necessary and reasonable steps to achieve the MBE Goal which by their scope, intensity and appropriateness to the objective, could reasonably be expected to obtain sufficient MBE participation, even if those steps were not fully successful. Quality, Intensity and Quantity of the efforts must be shown for determination. The efforts employed by the Bidder/Offeror should be those that one could reasonably expect a Bidder/Offeror to take if the Bidder/Offeror were actively and aggressively trying to obtain MBE participation sufficient to meet the MBE contract goal and sub-goals. Mere (pro forma) efforts are not good faith efforts to meet the MBE contract requirements. The determination concerning the sufficiency of the Bidders/Offerors good faith efforts is a judgement call; meeting quantitative formulas is not required. For further guidance, please review page 83 of the RFP.

Elizabeth Heinle-MBE RFP Coordinator stated the following:

- Questions as to if a firm is certified to perform specific services or provide specific products, you can contact Maryland Department of Transportation (MDOT) Minority Business Enterprise (MBE) via email at mbe@mdot.state.md.us.
- Percentage of the total contract amount must be entered as well on Attachment F-MBE Goals
- You must also indicate descriptions about how the MBE will be performing the tasks within the contract.
- Ten working days after being awarded, the vendor must submit the Outreach Efforts Compliance Statement form.
- Per COMAR 21.01.01.03 and 21.11.03.01, awarded MBE are to comply with the prompt payment requirements outline in the contract, Section 31 called “Prompt Payment” in which monthly reports must

be submitted to the contract monitor. Also subcontractors of the MBE must also submit monthly reports of payments to the procurement agency.

-Per new guidelines in COMAR 21.11.03.12-1(D), MBE who are the prime contractor can account for 50% of the overall, established, MBE participation goal and 100% of one of the MBE participation sub-goals. The MBE Primary Contractor can account for one and half of the percentage MBE Participation Goal. The other one and half must be sub-contracted out.

Section 4.2: Proposals

For the Technical Proposal submissions, the packages must contain the following items.

- 1) One unbound original
- 2) Four bounded copies
- 3) One electronic version on CD and Microsoft Word Format
- 4) I electronic version in searchable PDF on CD, DVD or flash drive for Public Information Act.

This copy shall be redacted so that confidential and/or proprietary information has been removed.

The Bidder/Offeror must submit a contract affidavit-Attachment C to the Procurement Officer within five business days of receiving notification of recommendation of award.

If you have questions as to who your resident agency representative, please call your state control office 410-767-1330. DHMH MBE Unit is located at 301 W. Preston Street, Baltimore, MD 21201. Please note that the contract award would not be released until the contract affidavit is signed, submitted and processed.

Section 4.4.3: Technical Proposal Submission

Please review this section to find out what is required to submit the proposal.

Section 4.5: Financial Proposal

Please review this section to find out what is required to submit the proposal.

For the Financial Proposal submissions, the packages must contain the following items.

- 1) One unbound original
- 2) Four bounded copies
- 3) One electronic version on CD and Microsoft Word

Section 5: Evaluation Committee, Evaluation Criteria and Selection Procedure

Sub-Section 5.1: An Evaluation Committee will review the proposals in accordance with COMAR 21.05.03, participate in Offeror oral presentations and discussions and provide input to the Procurement Officer.

Sub-Section 5.2: Technical Proposal Evaluation Criteria

This section speaks to the criteria used for reviewing proposals. Please read to familiarize yourself with the process.

Sub-Section 5.3: Financial Proposal Evaluation Criteria

This section speaks to the criteria used to rank the proposals based on total proposal price as stated in Attachment F.

Sub-Section 5.5: Selection Procedure

The Procurement Officer will recommend award of the contract to the responsible Offeror that submitted the proposal determined to be advantageous to the State. In making this advantageous to the State, technical proposals will receive equal weight with the financial proposals.

Offerors/Bidders are asked to please read the section on the date, time and location of where to submit their proposals. Proposals are due no later than Wednesday, June 29th by 2pm Eastern Standard Time. If the due date changes, OPASS will send out an addendum indicating new date. No proposals will accepted after 2pm on June 29th. Please submit your proposals to the address indicate on the RFP Key Information Summary Sheet.

Sub-Section 4.3: Delivery Preferences

There are two options:

- 1) U.S. Postal Service: Please make sure to get a receipt, signature and date stamp by the courier or mailroom.
- 2) Hand Delivery by a Commercial Courier: Please make sure to get a receipt, signature and date stamp.

Background, Purpose, Scope of Work-Terah Tessier

This is a request for proposal for the development of standardized, targeted case management training for the State of Maryland. There are eighteen case management entities serving individuals with intellectual and developmental disabilities which encompasses six hundred Coordination of Community Services agencies. Under DDA, there are 4 regions (Eastern Shore, Western Region, Central and Southern) in which the CCS function.

Purpose and Scope of Work:

The Offerors/Bidders are asked to review pages 25-28 of the RFP to get a full understanding what is expected. The vendor that is awarded the contract is expected to already have a developed training in place. The vendor will not be paid for developing a training module.

Question: How much training is expected to be developed? Response: There are 13 trainings being proposed. The minimum is 11 trainings.

Question: Are the training modules to be in hard copy or electronic version? Response: Preferred to be electronic.

Question: Will the CCS agencies bring their own laptops? Response: Your training manual should indicate what the necessary equipment to be used for the trainings.

Question: What is expected for how the trainings will be conducted? Response: Your training manual should indicate the process.

Question: What do you expect the vendor to provide with respect to supplies? Response: Supplies are indicated on the Bid Page.

Question: Targeted Budget Lines? Response: The Bidder/Offeror is asked to submit a budget for the trainings. There is no set estimated budget.

Question: Have you had a contractor develop this type of trainings? Response: No

Meeting ended at 10:10 a.m.